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FinancialPlanning

Wealthtech Weekly

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By Rob Burgess
Reporter

One of my favorite parts of writing "Show Me Your Stack" is that I'm often surprised by the tools advisors are using. Take Alvin Carlos of District Capital Management in Washington, D.C. He told me his unique tech stack allowed him to combine his CRM with financial planning because he wasn't afraid to look outside of solutions specific to the wealth management industry.

Do you use any unconventional tools? Let me know — robert.burgess@arizent.com.

I hope you'll check out the article, along with the rest of this week's stories.

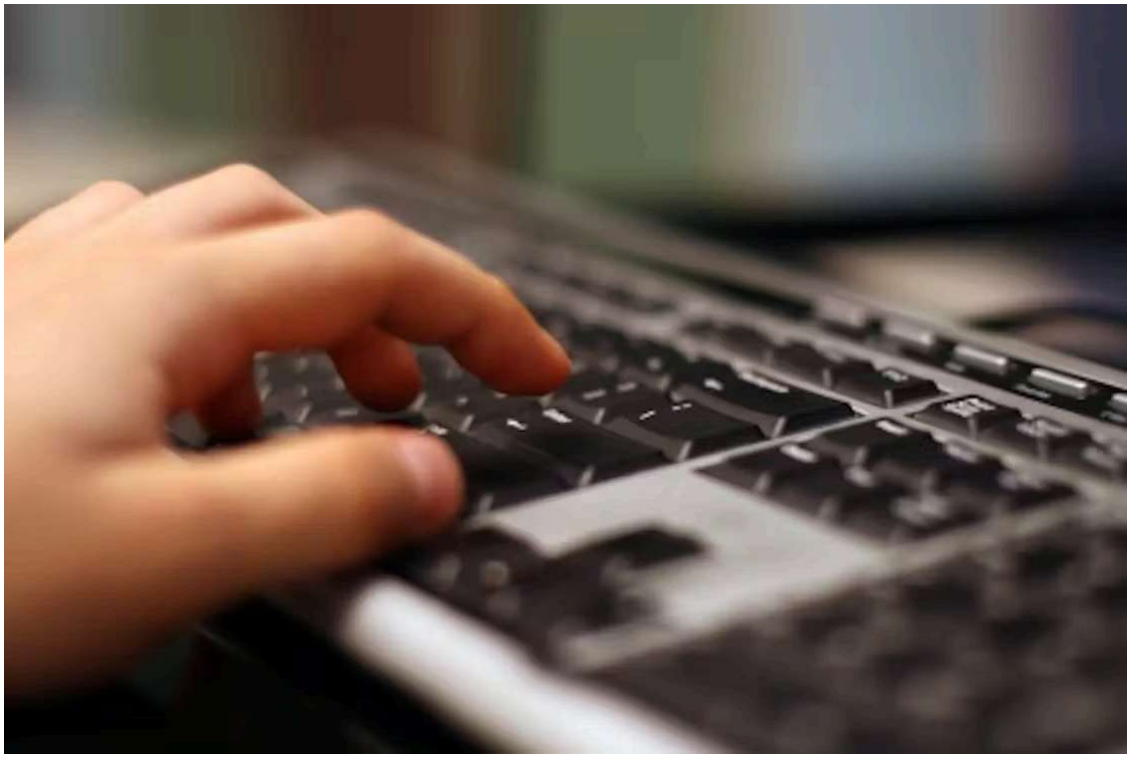
As always, thank you for reading. Talk to you next Thursday!

Connect with Rob:

TOP STORIES

SHOW ME YOUR STACK

Going beyond standard wealthtech choices: Show Me Your Stack



Alvin Carlos, financial planner and managing partner at District Capital Management in Washington, D.C., uses Monday.com for CRM and financial planning.

- **Advisor confidence inches upward from all-time lows**
  The May Financial Advisor Confidence Outlook survey shows that instability, especially around tariffs, continues to weigh heavily on the minds of advisors and their clients.
- **10 best and worst bond funds of the past 3 years**
  With the recent tariff-induced volatility, some advisors have been thinking twice before jumping into bond funds, but for those still interested, knowing the details can help choose the right one.
- **Allocate or avoid? Advisors weigh in on the recent gold rush**
  Amid the tariff-related uncertainty, gold hit an all-time record of $3,500 last month as some advisors and clients look for hedges.
- **Why Dynasty built a data lake for its AI-driven unified platform**

For the past three years, Leslie Norman, chief technology officer for Dynasty Financial Partners, has been working to help build infrastructure to house the data used in the firm's tech stack.

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